


Bob Dillon



As Managing Director of Sales for Google Customer Solutions, Bob leads Google's US sales teams in partnering with agencies like NetElixir to drive advertiser success. Over the past ten years, Bob has worked with hundreds of retailers to achieve their marketing objectives using Google's full suite of digital solutions.





COVID-19 Impact on purchase habits

Google

While many consumers are still just shopping for the essentials, we've seen declines in the past few months



agreed they're only buying essentials during Covid-19

... in June, 40% of US consumers were also shopping for items they enjoy having and items needed after COVID

Proprietary + Confidential



To get what they want, shoppers are open to buying online and exploring new brands

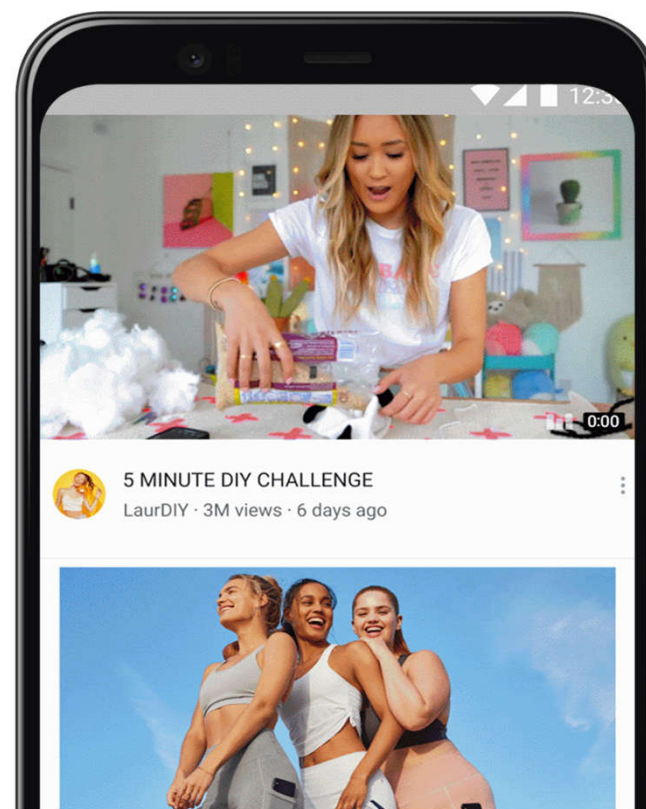
41%

of all retail web visitors were new
from March - July**

32%

of US shoppers **purchased a brand**
that was new to them during
COVID-19 and say they'll continue
to buy¹

Source: 1. MIT/Sloan: Growth Opportunities for Branding During COVID 19. 2. Google internal data



They are keeping up with deals/promotions online and expect them from retailers at this time

49%

of US consumers say they **expect retailers to offer them discounts when shopping with them online** at this time.¹

Top sources for keeping up with sales/promotions:

44% Store websites/apps

40% Emails from stores/brands

30% Searching online for deals/sales/promos/offers

28% Browsing digital flyers/circular from stores

28% Browsing paper flyers/circular from stores

Google

Consumers have heightened expectations now that they are having more delivered

+700%

Searches for **"best grocery delivery"**
have grown globally YoY³

+300%

Searches for **"with free delivery"**
have grown globally YoY²

51%

of US consumers **expect to be informed of any shipping delays they may encounter**

1. Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 18-21

2. Google Data, Global English, Apr 1, 2020 - May 30, 2020 vs Apr 1, 2019 - May 30, 2019

3. Google Data, Global English, Mar 11 - May 9, 2020 vs Mar 11 - May 9, 2019



Key takeaways for online shoppers

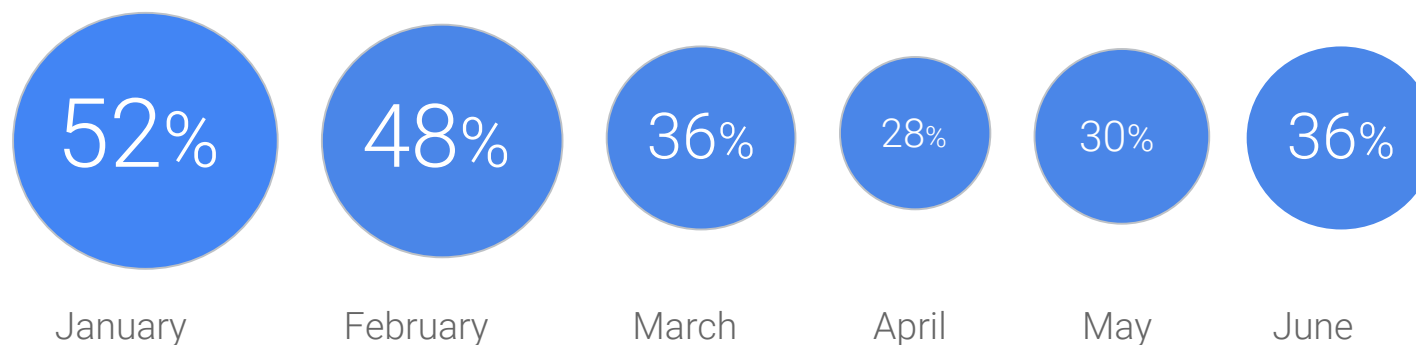
- 1. Shoppers have moved beyond the essentials
- 1. More shoppers are buying online and exploring new brands
- 1. Discounts are expected when buying online
- 1. Information about availability and delivery is critical

Evolving Role of the Store

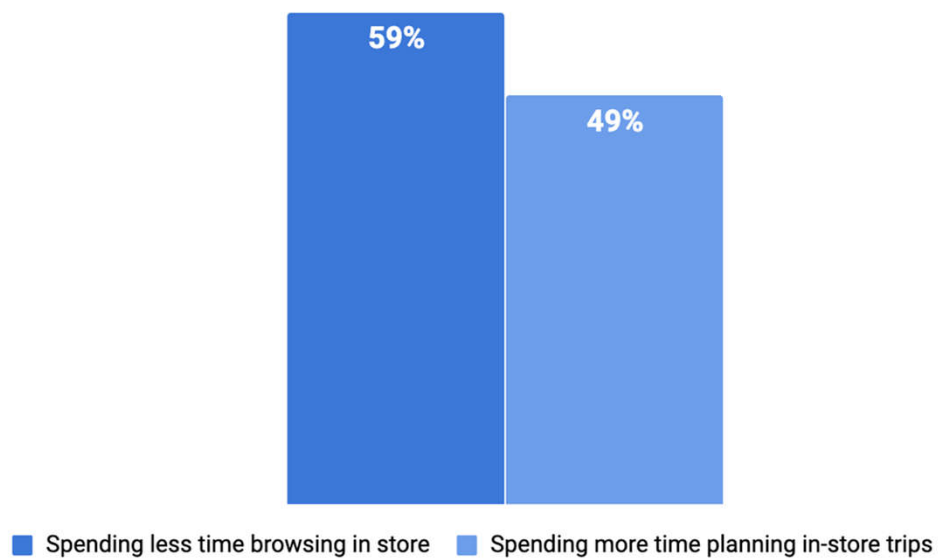


Shoppers did reduce their in store shopping when stores were closed, but are returning to stores

Visited a store or mall in the past two days



Shoppers are spending more time planning their shopping and they're doing this online



How shoppers are spending their time planning their in store shopping:

- 48%** looking online in advance for **deals or promotions**
- 35%** searching online to see whether the **items are stock**/carried at the store
- 26%** checking all the **ways they can buy/collect** at the store
- 24%** reserving items online for **BOPIS/curbside**

Trip and store consolidation planned, but at a cost to the customer and an opportunity for retailers/brands

70%

of US consumers say they are consolidating their shopping¹

Sacrifices consumers are making while consolidating²

42%

Not always getting the lowest price

40%

Not always getting the brands they normally buy

28%

Not always shopping at their preferred stores

28%

Picking up curbside rather than going in store

1. Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 25-28

2. Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 18-21

Curbside pickup is on the rise and may be here to stay

+3000%

Searches for “curbside pickup” have grown globally YoY²

+600%

Searches for “click + collect” have grown globally YoY¹

61%

Of US consumers think buying online and picking up in store/curbside will be a beneficial way for them to shop even when there are no restrictions.³

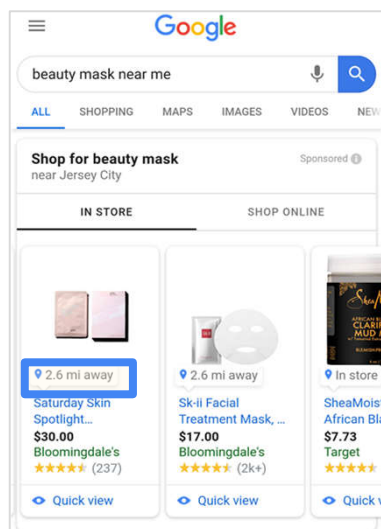
1. Google Data, Global English, Apr 15, 2020 - Jun 13, 2020 vs Apr 15, 2019 - Jun 13, 2019

2. Google Data, Global English, Mar 18 - May 16, 2020 vs Mar 18 - May 16, 2019.

3. Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 18-21

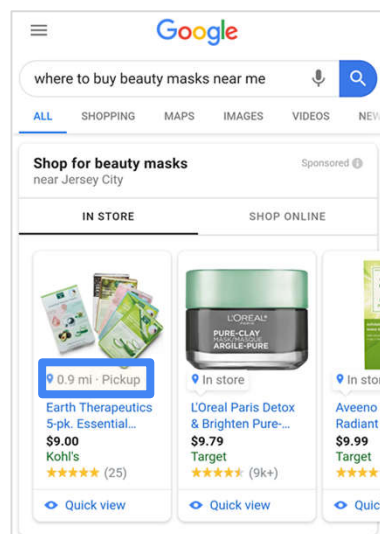
Google is reducing friction for omnichannel shoppers with increased fulfillment options like curbside pickup

Availability + Distance



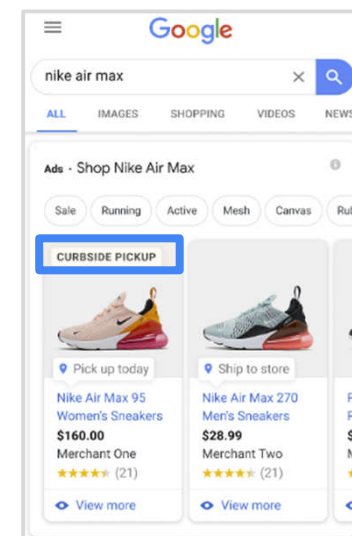
Show in-stock availability and distance to the shopper's current location

BOPIS + Ship to Store



Highlight fulfillment options like buy online pick up in store and ship to store

Curbside Pickup



Highlight items available for curbside pickup

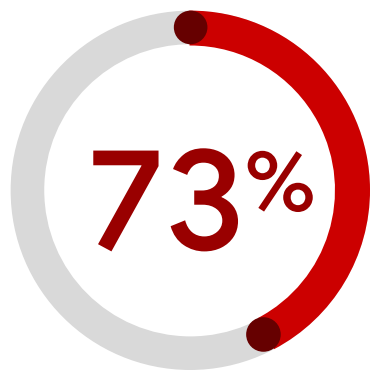
Key takeaways for in-store shoppers

- 1. Shoppers are returning to stores... 36% in June
- 1. They are planning store visits using online resources
- 1. They are consolidating trips and willing to make sacrifices
- 1. Curbside pick-up may be here to stay

A photograph of a shopping mall with a red tag overlay. The tag is a large, red, diamond-shaped graphic with a circular hole at the top, positioned on the left side of the image. The background shows a wide, brightly lit shopping mall with a high, vaulted glass and steel ceiling. The floor is a black and white checkered tile. On the right, there are large glass storefronts of shops, some with holiday decorations. In the center, a tall, decorated Christmas tree stands on a wooden base. Several people are walking through the mall. A "Google" logo is visible in the bottom right corner of the image.

Current Holiday Expectations

Google

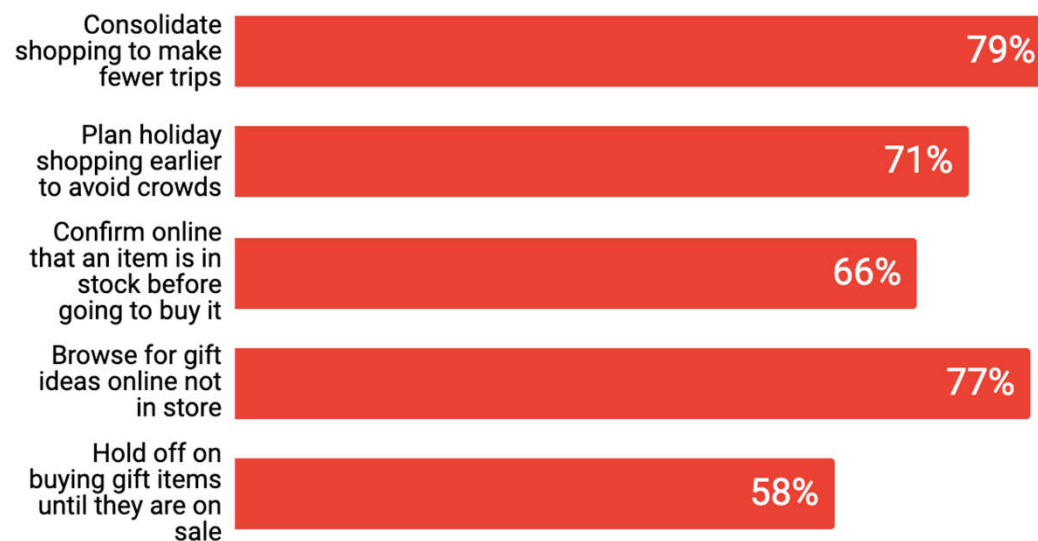


of US planned
holiday shoppers
say they will shop
online more for the
holidays²

Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 25-28

Google

Given current levels of nervousness and uncertainty, consumers who plan to shop for the holidays will...

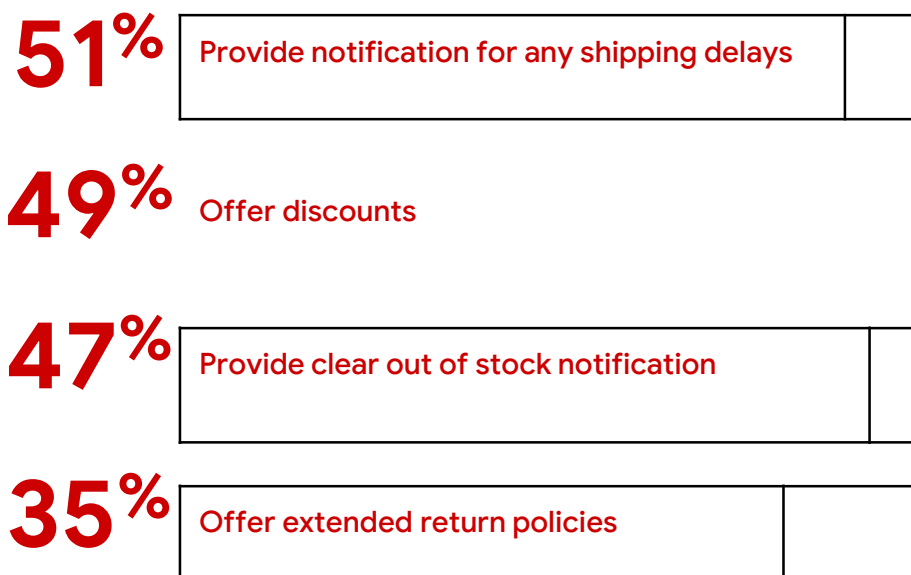


Holiday online shoppers expect a frictionless experience

40%

US consumers have experienced at least one issue when ordering online during COVID-19.¹

Expectations of online retailers:



1. Google commissioned Ipsos COVID-19 tracker, US n=1000 online consumers 18+ per market. June 18-21

Google commissioned Ipsos COVID-19 tracker, US n=745 18 +online consumers who plan to shop for the holidays. June 25-28

Holiday in-store shoppers are looking for safe options



In addition to contactless check-out, shoppers would use the following if retailers offered them:

42% Self serve checkouts

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40% A line specifically for BOPIS/Click & Collect

28% Self serve, same day locker pickup

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28% Book online appointment to shop in store

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Google

Key takeaways for holiday shoppers

- 1. Recent behaviors will carry forward into the holidays
- 1. Online shoppers expect a frictionless experience (stock, shipping)
- 1. In-store shoppers are looking for safe options (BOPIS, self-serve)

A photograph of a shopping mall with a green callout box. The mall has a high, vaulted glass and steel ceiling. The floor is a black and white checkered tile. On the right, there are large glass storefronts of shops. In the center, a Christmas tree is decorated with lights and ornaments, standing on a wooden base that says "Glitter, Sparkle & Shine". Several people are walking through the mall. A green callout box with a circular hole at the top is overlaid on the left side of the image.

The time to
prepare is...

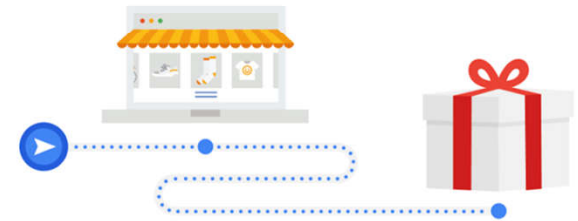
Now!

Google

Google Holiday Retail Toolkit

Act with more certainty

This four-step toolkit will help you create a more effective digital storefront, get the historical trends and real-time insights you need to develop a robust plan-of-action and expand your strategy to discover new audiences.



Step 1 | Digital Storefront

Step 2 | Insights

Step 3 | Strategy

Step 4 | Expansion

Google Rising Retail Categories



Rising Retail Categories

Consumer behavior is changing rapidly and unpredictably amid the coronavirus pandemic. Use this interactive tool to understand fast-rising retail categories in Google Search, the locations where they're growing, and the queries associated with them. The data will update daily to reflect changes in Search interests.

Country ⓘ
United States ▼

Change ⓘ
Yearly ▼

Top trending categories ⓘ

5. Motor Vehicle Windshield Covers	+800%
6. Craft Molds	+700%
7. Hand Sanitizers & Wipes	+600%
8. Disposable Gloves	+500%

Top growing queries in Free Weights ⓘ

1. dumbbells	100	<div></div>
2. adjustable dumbbells	75	<div></div>
3. dumbbell set	72	<div></div>
4. bowflex selecttech 552 adjustable dumbbells	58	<div></div>

Google Grow My Store

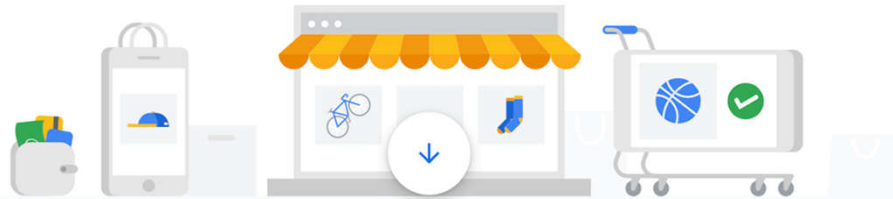
Improve your digital window to the world

In our ever-changing environment, boost your business with a quick and easy evaluation of your retail website.



Enter your website URL

Get started



A photograph of a shopping mall with a red tag overlay. The tag is red with a white circular hole at the top. The text "Thank you!" is written in white on the tag. The background shows a shopping mall with a checkered floor, glass storefronts, and a Christmas tree. The Google logo is in the bottom right corner.

Thank you!

Google